

AGENDA
CORE CASE MANAGEMENT/DOCUMENT IMAGING
Track Committee
July 30 & 31, 2007

Monday, July 30th

9:00 a.m. **Participant Introductions**

9:15 a.m. **Overview – Karen Nelson**

- Pilot Project Recap
- Committee Goals Discussion
- Session Approach – Brenda Marks

10:00 a.m. **FullCourt and Document Imaging Demonstration/Gap Identification**

- **Case Numbering**
- **Searching**
- **Party Records, Aliases**

- **Creating Criminal Case**
 - Party Searching
 - Case Creation
 - Random Judge Assignment
 - Enter Bond
 - Enter Attorneys
 - Filing/Scanning of original charging document
 - Overview of Register of Actions
 - Scheduling Hearings
- **Creating a Civil Case**
 - Civil Filing, Fees
 - Adding Parties
 - Receipting Filing Fee
 - Case Created
 - Enter Attorneys
 - Filing/Scanning of original document
 - Scheduling Hearings
 - Attaching Minutes (documents)
 - Overview of Register of Actions
- **Hearings Calendar**
 - Calendar Management
 - Master Calendar
 - Judges Calendar

➤ **Creating Marriage License**

- Civil Filing
- Receipting
- Adding Parties
- Bride and Groom Designation
- Adding Marriage application information
- Possibly Create Marriage License App to demonstrate document templates in FC

➤ **Actions on Existing Cases**

- Marriage License after marriage completed
- Clerk Image and Document Retrieval
- Civil Judgments
- Judgment Events
 - Judgment Book Report
- Child Support Trust
 - Civil Trust by Trust Type Report
- Criminal Disposition through Hearing (Dispositional Hearing)
 - Criminal Judgment creation

➤ **Reports**

- ROA report filtered by document ID
- Register of Criminal Actions
- Register Log Report
- Judgment Index Report
- Judgment Book Report
- Docket (transcript of judgment)
- Index Report Plaintiff
- Index Report Defendant
- Marriage License Reports
- Civil Trust Reports
- Statistical Reports
- Financial Reporting

➤ **Financials**

- Core Functionalities (no general ledger)
 - Tracking criminal bonds
 - Fines/Fees by statute
 - Identify fees and prioritize based on statute or local rules
 - Civil Trust payments
 - Restitution entered on cases
- Receipting
- End of Day Balancing
- End of Period Disbursements
- Advanced Functionalities Discussion (general ledger)
 - Deposits
 - Bank Reconciliations

➤ **Public Security and Access**

- Searching
- Differences in Views of Party Details
- Differences in Views of Case Details
- Differences in Views of Images and Documents

3:30 p.m.

Re-Cap of Demonstrated Functional Requirements and Identified Gaps

AGENDA
CORE CASE MANAGEMENT/DOCUMENT IMAGING
Track Committee
July 31

Tuesday, July 31th

- 9:00 a.m. **Review Standard Table Setup and Configuration Process**
- Demonstrate State Standard Setups
 - Review Security Configuration
 - Validate Setups and Identify Gaps
- 11:00 a.m. **Review and Standard Table Values FullCourt and Document Imaging**
- Validate FullCourt Standard Table Values
 - Identify Gaps in Standard Values
 - Demonstrate Locally Controlled Tables
 - Review Records Retention Schedule and Standard Images
- 1:00 p.m. **Review and Prioritize Modification Requests**
- Supplementary prioritization functionality to Hearings Scheduling/Docket Sheet
 - Inclusion of Alias Name on Name Index Report
 - Inclusion of Alias Name in the Parties of the Judgment Window
 - Addition of a Department Number data field
 - Addition of Department Number to Web Page Calendar
 - Media Disposition Report should not show Defendants Date of Birth, rather display Defendants Year of Birth in order to comply with the Supreme Court Access rules.
 - Allow alternative charging statutes to be entered
 - Allow charges with modifiers to be entered
 - Party drop down box on civil trust payment window
 - Security level to change only the text of a ROA code setup
- 3:00 p.m. **Change Control Management Procedures**
- Review existing procedure
 - Identify Gaps
 - Identify changes in approach